BOTTLED WATER ☐ WINE ☐ POWDERS ☐ JUICES ☐ SPIRITS

NOVEMBER 6, 1981

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MARKETING ... Y

PUBLISHED EVERY OTHER FRIDAY

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...ASHINGTON DC 2001...
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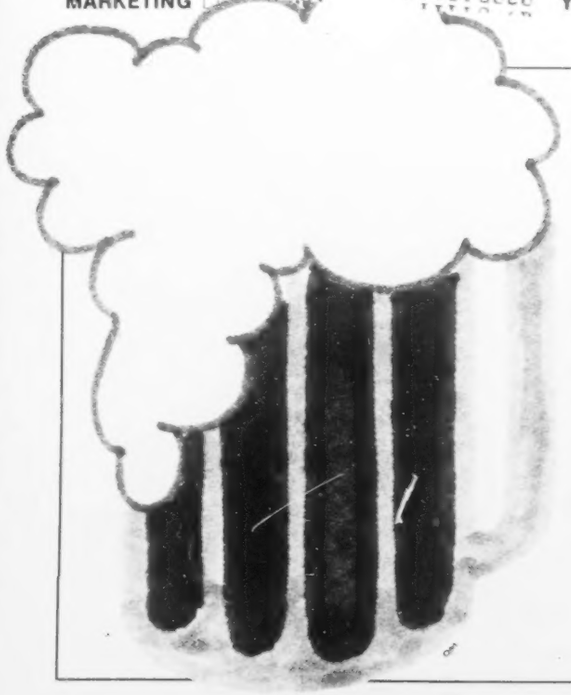

On premise up, spurred by big draft growth

SPECIAL REPORT — While on-premise beer sales rose to 57.7 million barrels, a similar growth rate as the industry's 3.1% last year, draft beer, which increased its on-premise sales share to 36.4% of that segment, recorded an impressive 8.2% barrelage gain in '80 to 21 million barrels, possibly signaling a burgeoning on-premise market in the coming years.

These figures, obtained from the United States

(Continued on page 6)

New campaign, bigger budget for Schweppes

TARPON SPRINGS, FL — Schweppes will launch a "totally new" advertising campaign in the spring of next year and will be increasing its marketing budget by 40% over this year's budget, it was announced here at a marketing conference.

With more than 450 representatives of United States, Canadian and Latin American bottlers in attendance, Robert E. Ix, chairman of Cadbury Schweppes American, said that "through the joint efforts of Schweppes and its franchised bottlers, Schweppes in the Americas is having its best year ever. The brand continues to gain momentum and is growing rapidly in absolute volume and share."

"We have the commitment, and the resources, to achieve our goal of leadership in the

(Continued on page 15)

Fogarty named Squirtco COO, executive vp

HOLLAND, MI — Michael D. Fogarty, formerly vice president marketing and sales, has been named executive vice president and chief operating officer of Squirtco, located here. Fogarty replaces W. Donald Avriett, who has been named vice chairman and member of the board of Squirt & Co.

Fogarty joined Squirt in

(Continued on page 13)

BI Package of the Week

Ethyl to launch new lined plastic closure

RICHMOND, VA — Ethyl Molded Products, located here, will introduce its new prethreaded, lined plastic closure at this year's NSDA exposition, Dec. 1-3, in Los Angeles.

Tested initially in Coke-Mid America's Topeka and Manhattan, KS, franchises, the closure was introduced by Coca-Cola Midwest in early November. In Kansas the closure was used on 2-L PET; in St. Paul/Minneapolis the closure is appearing on 1- and 2-L PET bottles.

According to Ethyl spokesman Ken Donahue, the 28-mm closure has passed Coca-Cola's laboratory tests. He also told **Beverage Industry** that his firm is working with other bottlers and other franchise firms on introduction of the closure in additional markets. A plastic closure for glass is also being developed.

Molded on Ethyl proprietary equipment from polypropylene, the closure has an EVA (ethylene-vinyl acetate) food-grade plastic line which is inserted at the point of manufacture. The liner is

(Continued on page 14)

BI Week

• PepsiCo's third quarter and nine months sales were up 15% and 19%, respectively. Net income for the same two time spans was up 16% and 15%, respectively. Soft drink case sales were up 3% and sales were up 11%, income 9% for the quarter.

• Wometco Coca-Cola Bottling Co., Nashville, TN, won game two, the deciding game in O-I's MVP contest. Firm's 10 MVP team members (plus companions) won all expenses paid trip to the World Series.

• Hearings on a National Mandatory Deposit bill are slated for Nov. 5 before the House Commerce Committee. Chairman Sen. Robert Packwood is one of the sponsors.

• Coke reportedly plans to fight Pepsi's Challenge commercials with a new Bill Cosby spot. Ads reportedly will run in 80% of the country (where Pepsi pushes the Challenge theme).

• Green Spot Co., S. Pasa-

(Continued on page 25)

Retail ties, sampling key '82 Dr P objectives

DALLAS—Strengthening relationships with the retail trade and increased emphasis on product sampling were presented as key 1982 objectives for Dr Pepper bottlers at the company's International Bottler Meeting, held here last month.

Opportunities for strengthening the company's solid number three soft drink sales position with optimism for eventually moving up to the second place slot were also expressed by the company's top executive.

"We have seen more changes in the past 18 months than in the entire history of our industry," W.W. Clements, Dr Pepper chairman and CEO, told the bottlers. *(Continued on page 13)*

Dr P's new national ad for its Sugar Free brand. Dr P will more than double co-op ad dollars for local media in '82.

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Ethyl to launch new lined closure

Ethyl molded products of Richmond, VA, will introduce a new lined, prethreaded plastic closure at this year's NSDA convention. The closure has been used on 1- and 2-L PET bottles and, according to a company spokesperson, a plastic closure for glass is also being developed. For more information on this issue's **Package of the Week**, see **page 1.**

OSHA lifts noise stay

OSHA will accept baseline audiograms that were taken using hearing protectors as a substitute for 14 quiet hours, NSDA reports in bulletin to its members. OSHA partially lifted an administrative stay on the controversial Hearing Conservation Amendment; the regulation covers all workers, except construction and agriculture, who are exposed to an eight hour noise level of 85 dbs or more. For more about what NSDA sees as significant to bottlers concerning the OSHA stay, see **page 4.**

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Saudi SD market valued at $530 million

In 1981 the Saudi Arabian soft drink market has topped its high point of $500 million according to a report published by International Marketing & Economic Services titled "Soft Drinks '81 — Saudi Arabia." The report's figures indicate that sales of carbonated soft drinks have almost doubled over the last five years, while the annual rate of increase has slowed from 25% to under 10% during the period. For additional figures and charts, see **page 4.**

Roberts named president of Genesee Brewing Co.

Walter B. Roberts Jr. was elected president of the Rochester-based Genesee Brewing Co. Roberts replaces William Hoot, who was elected to the newly created position of vice chairman of the board. For other appointments, see **page 10.**

RC 100 to get $500,000 for regional ads

Over $500,000 has been allocated for TV and print ads to introduce the second phase of Royal Crown Beverage Co.'s regional campaign for RC 100. The prime time TV spots will air in Southern California markets through the end of this year. **page 10.**

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Draft beer

(Continued from page 1)

Brewers Association and Robert S. Weinberg, R. S. Weinberg & Associates, a St. Louis-based brewers research firm, show a dramatic growth for draft, which is almost exclusively consumed on-premise. Draft accounted for 12.1% of total industry taxpaid withdrawals last year, up 0.5% for the second consecutive year. And, in the first seven months of this year, draft volume was 13.1 million barrels, a 6.6% increase over the same period in '80.

The last year in which draft beer sales topped 20 million barrels was 1953. Draft business had plateaued in the '40s, declined throughout the '50s and leveled off during the '60s and much of the '70s. From '73 to '78, draft sales had been hovering around 18.2 million barrels. Then, in '79, sales topped 19 million for the first time since '54.

on-premise growth

However, recent draft growth has come at the expense of packaged in the on-premise segment, since total on-premise growth does not equal that of draft. But many in the industry feel that draft will continue to grow at that rate for the next several years and that packaged won't continue to yield market share on-premise at a comparable rate, so the industry might be seeing signs of an on-premise growth rate greater than off-premise.

Weinberg cites three key factors that have spurred draft growth recently.

- Draft rates tend to increase when a state passes a deposit law. For example, Michigan's draft share hovered around 11.5% from '76 to '78, but then in '79, with the deposit law effective Dec. 3, 1978, draft shot up to a 14.6% share and up further to 16.03% last year. In Iowa, which passed a deposit law effective August 1, 1979, draft share, which had been 14.9% in '76, 14.2% in '77, 13.3% in '78 and 15.5% in '79, jumped to 20.3% in '80. Connecticut passed its deposit law on Jan. 1, 1980, and witnessed a draft share jump from 14.4% in '79 to 18.3% last year.
- Relaxation of state laws limiting the number of drinking establishments.
- Changing economies of draft for the retailer.

Weinberg explains that with the passage of deposit laws, the bar owner sees handling draft in kegs as less of an inconvenience than collecting empty bottles, which the owner must do because he pays a deposit on every bottle in addition to the price of the beer. Wholesalers used to convince retailers not to bother with kegs and use non-returnable bottles, but now that's changed with deposit laws, says Weinberg.

In terms of the economies, many retailers perceive increasing packaging prices, especially non-returnable bottles, as becoming more expensive than draft and so, according to Weinberg, they're saying, 'Let's go back to draft.'

Weinberg notes that since '78 the serving size of draft has stabilized. Before that, as the price of a glass of beer went up, the serving size went down: the growth rate of draft servings was greater than the growth rate of draft gallons consumed. Now, he says, we've reached the point where the serving size just can't be reduced any further, so gallons consumed have started to increase along with increased number of servings.

However, Weinberg is quick to add, "I have not heard of any brewer who is contemplating a change in their marketing strategy because of the draft ratio increase."

"Draft beer sales have definitely been increasing, and we've been the primary beneficiary," boasts an Anheuser-Busch spokesman. He claims that "Budweiser and Michelob are the two best selling on-premise beers."

The A-B spokesman says there are many reasons for draft popularity, including its fresh, somewhat different taste; its status, with an increasing number of home draft dispensing units being sold, especially among the affluent; draft, which is, in effect, in bulk, is less expensive to buy and serve; certain brewers have placed an emphasis on further draft penetration; technological improvements, including the single-valve keg and the increasing popularity of the quarter barrel.

Weinberg and the A-B spokesman mentioned the historical benefit of draft, that of showcasing your beer and developing brand loyalty. "On-premise establishments give the consumer a unique opportunity to sample another brewer's beer," says Weinberg. Weinberg says a typical bar will have a premium, a light and a local beer, if there's a popular one, on draft. He added that a great part of Miller Lite's success (number three brand last year) is the fact that they "have cornered the draft market. It's very rare that a bar would have two lights on draft."

"Our beer business has been increasing every year for the past few years," says Luther Romo, senior product manager-beer product line

Production draught and packaged sales and total taxpaid withdrawals of malt beverages

For Calendar Years 1933-1979 (Quantities in 31 Gallon Barrels)

Calendar year	Production	Packaged sales	% of total	Draught sales	% of total	Total taxpaid withdrawals
1940	53,863,734	26,761,946	51.7	25,049,151	48.3	51,811,087
1941	60,636,547	32,199,010	56.1	25,204,362	43.9	57,403,372
1942	68,271,501	37,917,179	58.7	26,666,939	41.3	64,584,118
1943	75,624,489	44,248,184	60.9	28,444,754	39.1	72,692,938
1944	85,779,934	49,543,252	62.3	29,970,952	37.7	79,524,204
1945	88,205,537	52,664,148	64.3	29,177,247	35.7	81,841,395
1946	83,312,516	53,010,253	66.6	26,530,243	33.4	79,540,496
1947	91,742,212	58,899,477	67.6	28,272,887	32.4	87,172,334
1948	88,125,320	58,692,355	69.0	26,367,959	31.0	85,067,314
1949	88,618,322	59,443,805	70.3	25,113,802	29.7	84,557,607
1950	88,178,356	59,487,521	71.8	23,342,616	28.2	82,830,137
1951	89,742,138	61,706,743	73.6	22,116,893	26.4	83,823,636
1952	90,489,824	63,359,469	74.7	21,477,011	25.3	84,836,480
1953	92,104,063	65,830,505	76.5	20,214,611	23.5	86,045,116
1954	88,940,268	63,927,035	76.7	19,377,986	23.3	83,305,021
1955	90,285,488	66,179,019	77.9	18,798,255	22.1	84,977,274
1956	90,338,445	67,087,002	78.9	17,921,154	21.1	85,008,156
1957	89,465,986	66,982,200	79.4	17,388,825	20.6	84,371,025
1958	90,120,512	67,168,341	79.6	17,256,368	20.4	84,424,709
1959	93,127,427	70,308,462	80.2	17,313,897	19.8	87,622,359
1960	93,415,363	70,955,595	80.7	16,957,244	19.3	87,912,839
1961	95,030,031	71,910,757	80.8	17,117,674	19.2	89,028,431
1962	96,831,989	74,128,498	81.3	17,068,659	18.7	91,197,157
1963	100,631,563	76,343,134	81.4	17,446,808	18.6	93,789,942
1964	105,897,968	80,685,951	81.8	17,958,041	18.2	98,643,992
1965	108,221,725	82,624,078	82.3	17,796,839	17.7	100,420,917
1966	113,037,193	86,531,831	83.0	17,730,210	17.0	104,262,041
1967	116,550,659	89,579,475	83.7	17,394,922	16.3	106,974,397
1968	122,407,762	94,007,957	84.4	17,407,741	15.6	111,415,698
1969	127,311,042	98,991,915	85.1	17,279,482	14.9	116,271,397
1970	133,123,267	104,619,875	85.9	17,240,131	14.1	121,860,006
1971	137,479,910	110,026,703	86.4	17,370,566	13.6	127,397,269
1972	141,336,930	114,219,578	86.7	17,589,085	13.3	131,808,663
1973	148,601,510	120,340,835	86.9	18,127,596	13.1	138,468,431
1974	156,147,443	127,227,705	87.5	18,236,377	12.5	145,464,082
1975	160,598,916	130,229,488	87.6	18,414,297	12.4	148,643,785
1976	163,782,125	132,125,154	87.9	18,262,233	12.1	150,387,387
1977	170,507,857	138,673,342	88.4	18,240,789	11.6	156,914,131
1978	179,656,544	144,585,652	88.9	18,120,235	11.1	162,705,887
1979r	184,187,771	148,685,015	88.4	19,431,684	11.6	168,115,697
1980	194,091,081	152,301,550	87.9	21,020,244	12.1	173,321,794

r: revised

Source: Treasury Department, Bureau of Alcohol, Tobacco and Firearms.

Copyright: Beverage Industry, November 6, 1981

for the Cornelius Co., makers of, among other equipment, everything from the keg to the glass.

"Draft is more economical to the retailer," Romo asserts. He explains that, with 6.88 cases equalling a half-barrel, and with cost per case at $7-10 and a barrel at $28-31, "that's (the cost) almost double the price (cases over barrel) for the same amount of beer."

keg handling

Romo believes another big factor for recently increasing draft sales is the new, easier ways to handle kegs.

Hackney & Sons On Tap keg dispensing unit (see **BI** May 8, 1981, p. 24) is one recent innovation many in the industry cite as being a substantial work, time and hence money-saving device. The unit is an all-aluminum rack that holds up to 12 kegs with a base designed to function as a pallet. Once loaded onto the truck, kegs are dispensed at the threshold of the bay, at waist level, with a pull of a handle.

"It permits all route trucks to carry kegs," says Hodges Hackney, president of the company. "Not everyone can handle a 160-pound keg of beer." The On Tap device makes it unnecessary for anyone to climb up into the bay and drop a keg to the floor.

"We've sold quite a few. Sales have exceeded our expectations," says Hackney. "However, this is a long-term thing. Modifications will have to be made; these units don't fit into every route truck." Hackney adds that the "significance" of the On Tap unit will really be felt in the years ahead, saying "we've only scratched the surface."

On draft beer sales, Hackney says, "I know breweries want to increase their draft sales. Draft builds brand loyalty, increases their barrelage." He says, as have others, that wholesalers aren't as excited about it because it is not as big a product as packaged. In fact, Weinberg says that "wholesalers wouldn't even touch draft if he weren't obligated to. They put up with it because they want the business."

Weinberg projects substantial draft growth during the coming years: '81 projected sales at 22.8 million barrels, 23.8 million barrels in '82, 25.5 in '83, 27.0 in '84 and 28.6 million barrels in '85, but hedged on exactly how much greater on-premise sales would be during those years, though he said it could very possibly outpace off-premise business.

Kronenbourg to offer off-premise glass promotion

GREENWICH, CT — Kronenbourg will offer an off-premise promotion of sets of six imported Alsatian beer glasses beginning this month so that orders can be filled in time for holiday gift-giving, the company announced recently.

Being offered to consumers from Boston to Baltimore, the glasses are designed in the French pilsner tradition, featuring the colorful Kronenbourg logo and shield. Set of six will cost $4.75, including shipping and handling, with no proof of purchase required.

"I'm confident that this will be our most successful

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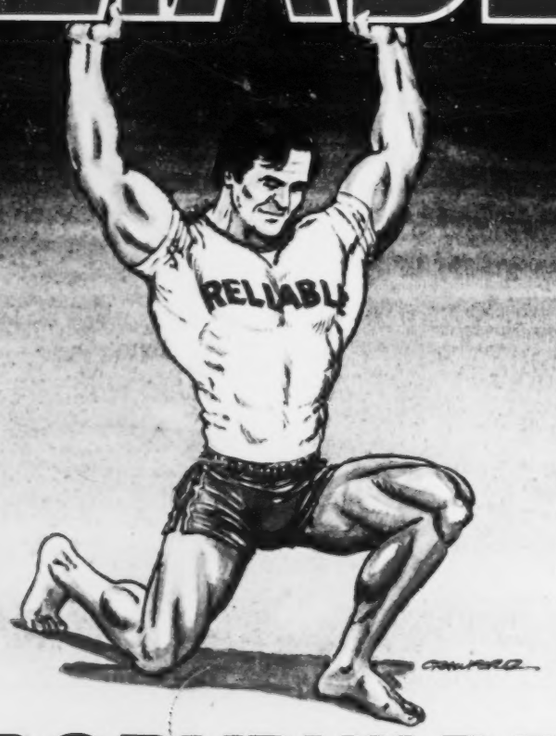

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OSHA announces partial lift on noise stay

WASHINGTON, DC — In a bulletin to its members, the National Soft Drink Assn. reports that the Occupational Safety and Health Administration partially lifted an administrative stay on the controversial Hearing Conservation Amendment. The regulation covers all workers, except construction and agriculture, who are exposed to an eight hour time-weighted average noise level of 85 decibels or more.

One of the most significant changes in the current version of the amendment is OSHA's acceptance of pre-existing baselines and audiograms, according to NSDA. Since the prohibition against the use of hearing protectors to achieve the quiet hours is being stayed, OSHA will accept baseline audiograms that were taken using hearing protectors as a substitute for 14 quiet hours. NSDA noted OSHA's flexibility in its pronouncement that it will continue to accept these audiograms in the future as valid baseline audiograms regardless of the outcome of the stay and will accept older baselines that reflect substantial compliance with the audiometric test requirements of the amendment.

The amendment, except for those provisions that continue to be stayed, became effective August 22, 1981. Future changes in the amendment will be based on OSHA's evaluation of comments received on the continuation of the stay and on those provisions which have been reopened (comments due 11/23/81), NSDA reports.

In a related matter, clarifications were provided on the availability of hearing protectors. The intent of the requirement is that workers should have more than one type of device, preferably a choice of three or more de-

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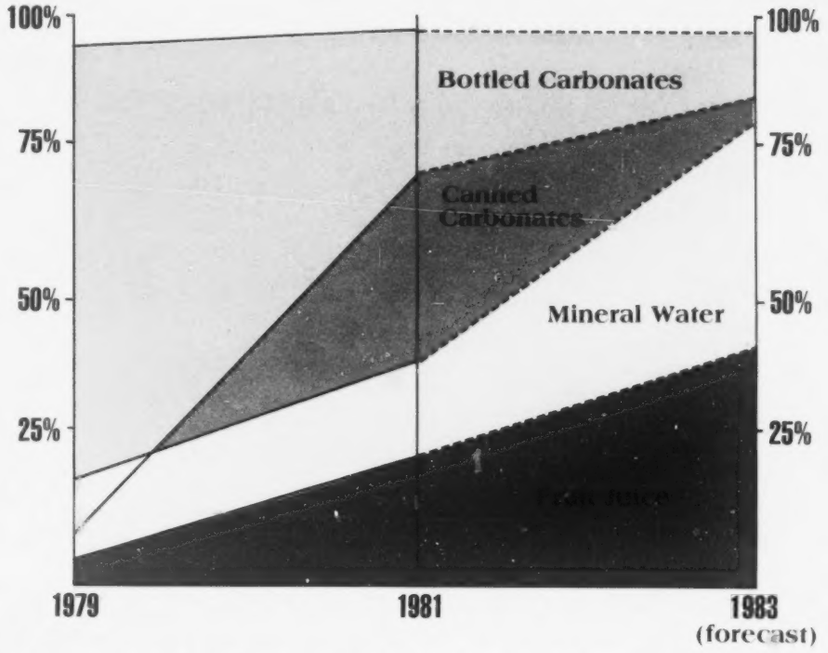

Market Self-Sufficiency in Major Soft Drink Sectors, 1979- 1983 (forecast) (local production as percentage of consumption).

Schaefer debuts Light Lager

NEW YORK — F&M Schaefer Brewing Co. is currently testing Schaefer Light Lager Beer in 12 oz. bottles and cans in three markets. The package was designed by the Chajet Design Group, who also designed the package for Schaefer Cream Ale, as well as the packages for Coke's allied brands, Fresca and Mello Yello.

Future marketing plans for the new brand are being handled by Stroh, Schaefer's parent company.

• For more information on the **Chajet Design Group**, circle no. 608 on reader service card; for **Schaefer Light**, circle No. 609.

Saudi sales at $530 mil.; self-sufficiency by 1983

INTERNATIONAL REPORT — The 1981 Saudi Arabian soft drink market is valued at around $530 million, the first time ever it has topped $500 milllion, according to a report published by International Marketing & Economic Services recently, titled "Soft Drinks '81 — Saudi Arabia."

The report says that "The most significant feature of the Saudi market's development over the last three years has been the steady progression of the industrialization process as the Kingdom strives for self-sufficiency."

In '79, with the exception of carbonated beverages (bottled carbonates), the market was very largely import-oriented; however, in '81, local manufacturing is developing rapidly, especially in canned carbonates, and already accounts for about half of total market consumption. And by '83, according to the report, three of the four sectors (bottled carbonates, canned carbonates, mineral water, fruit juice) will be over 80% geared to locally produced brands (see chart).

The report's figures also indicate that sales of carbonated soft drinks have almost doubled over the last five years, while the annual rate of increase has slowed from over 25% to under 10% during the period. Sales are expected on average to show yearly growth of about 5% in the short to medium term, according to the report.

"Flavoured aerated drinks currently account for a least half of the total soft drinks market by value — the other half comprises, in order of importance, fruit juice products, mineral water, nonalcoholic beer, squashes/syrups, powdered fruit drinks and flavoured milk," according to the report.

Canned product, the report goes on, has been continuously eroding the bottle's market share (even though bottle sales have held generally steady in terms of volume) to the point that over 60% of unit sales in '81 will be in cans (see chart).

Several new bottling franchises (Crush and RC Cola as well as others) and new plants being built outside the major cities are expected to cause a resurgence of bottle sales in the immediate future and arrest, at least temporarily, the steady swing to cans, according to the report.

Other items mentioned in the report include:

• The majority of new production activity is being seen in canned/bottled carbonates and mineral water; despite many live industrial licenses, the huge fruit juice sector remains surprisingly over 75% import-dependent.

• Following the huge over-ordering of canned carbonates, especially at the end of

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Saudi trends

(Continued from page 4)

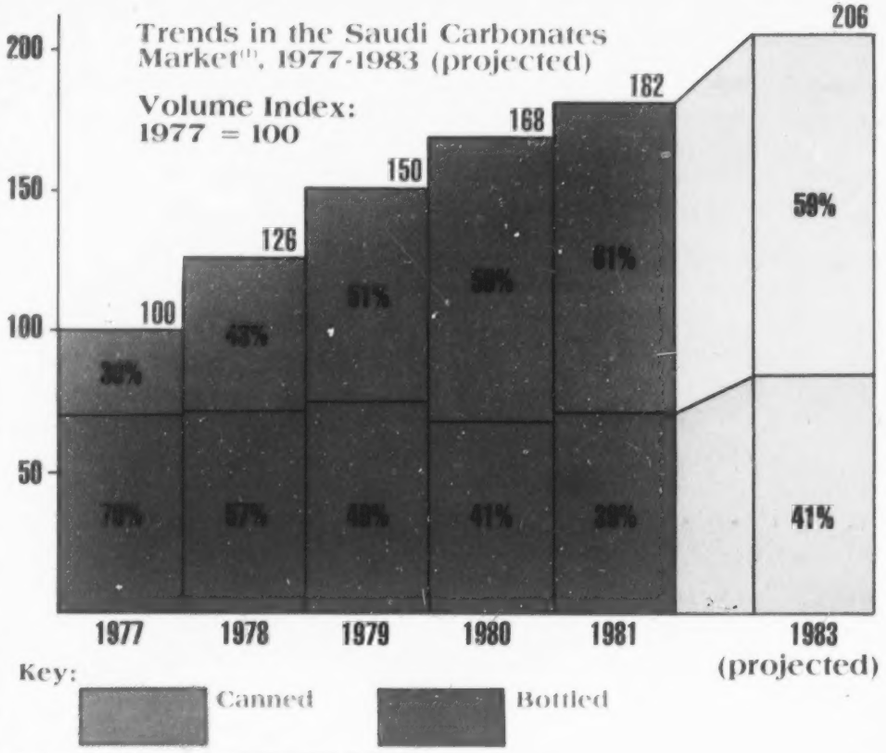
'79, there has been a major shake-out of brands and a number of minor importers have now ceased trading.

• In canned carbonates, the Japanese slimline can has become well-entrenched in the West/South, but it remains to be seen how the market will react when Pepsi canning starts in Jeddah this year.

• The fruit juice market continues to expand despite some evidence of substitution by canned carbonates/fresh juices; carton-packed drinks have been a huge success and demand for (bottled) natural juices continues to grow, but cheap nectars are on the decline.

• Mineral water, nonalcoholic beer and flavoured milk have all shown steady sales growth, but squashes/syrups and powdered drinks markets have been fairly static.

For more information on the "Soft Drinks '81 – Saudi Arabia" report, write International Marketing & Economic Services (UK) Ltd, The Grange, Harmondsworth, West Drayton, Middlesex UB7 0AW.



(1)Excluding non-alcoholic beer.

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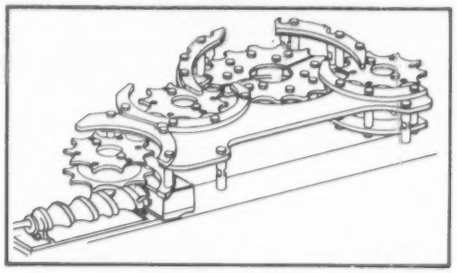

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News Makers

Tanck gets new spot at Schaefer Corp.

NEW YORK – Alfred A. Tanck has been appointed to the newly-created position of senior vice president of the F. & M. Schaefer Corp.'s international operations. He will be responsible for import and export activities for all Schaefer brands and those of the parent firm, The Stroh Brewery Co. of Detroit, MI.

Tanck

Tanck will continue to direct Schaefer's marketing efforts in Puerto Rico and the Caribbean, while investigating and developing other opportunities for Schaefer and Stroh brands outside the U.S. He will additionally be responsible for establishing and operating a new import development program, spearheading a new effort by Stroh.

Coke names Truitt vp for frozen operations

HOUSTON, TX – George W. Truitt has been named vice president and director of frozen operations for The Coca-Cola Co. Foods Division. He will be responsible for all matters related to the Division's frozen citrus business.

Truitt

Truitt had served as vice president and technical director of the Foods Division since 1973. His appointment results from a reorganization of the Division's frozen operations to increase efficiency by unifying all functional areas of the frozen citrus business into one reporting unit.

Frozen operations will be centered in Auburndale, FL, site of the company's largest citrus manufacturing plant.